

PeopleSoft

Transfer Checklist

HR/Payroll/Benefits

*Transfer is used when an employee does not have a break in service with the State. Once the Prepare for Hire is done by the Receiving agency OMB is notified by email. **The Job Data transfer is done by OMB for all employees transferring to a different agency.***

HR/Payroll Checklist for Transfer of an Employee employed by another Agency

TRANSFERRING AGENCY:

- Fill out the PERS transfer kit for employee and send to receiving agency
- Contact agency employee is transferring to and provide them with the number of Annual Leave hours they will have at time of transfer to see how many if any you will need to payout.
- **The Job Data transfer is done by OMB for all employees transferring to a different agency.**

RECEIVING AGENCY:

HR: The Job Data transfer is done by OMB for all employees transferring to a different agency.

- Once OMB does the transfer in Job Data, Verify the information on (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Employee Data> Job Data)
 - Work Location
 - Job Information
 - Payroll
 - Salary Plan
 - Compensation
 - Employment Data
 - Earnings Distribution

And make any changes necessary or email OMB for corrections.

- Verify all personal information is correct in Modify a Person. (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Employee Data > Modify a Person)
 - Biographical Details
 - Contact Information
 - Regional

Make any necessary changes.

- Enter Workers Compensation (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process> Workers' Compensation)
- Emergency Contact (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process > Emergency Contact)
- Designated Medical Provider (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process > Designated Medical Provider)
- Driver's License Data (optional) (Navigation: Workforce Administration> Personal Information> Biographical> Driver's License Data)
- ACA Employee Eligibility - (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process >ACA Employee Eligibility)

Payroll: All of these pages should be verified that they are correct for the employee's current position.

- **Direct Deposit** (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process > Request Direct Deposit)

The 'Suppress DDP Advice Print' box should be checked for all employees with self service access

- **Employee Tax Distribution** (Navigation: Payroll for North America> Employee Pay Data USA> Tax Information> Update Tax Distribution)

This panel should be checked for correct locality information

- **Employee Tax Data** (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process > Update Employee Tax Data)
 - Federal Tax Data
 - State Tax Data

Commitment Accounting: (Navigation: HR/ Payroll Page> Payroll Administrator Tile> Hire/Update Employee Process >Department Budget Table USA)

- **Department Budget Table** - *All employees must have a department budget table. If the hire is a permanent employee filling a previously existing position,*

the table may already be set up, but ensure the established combination code is correct for that employee.

Benefits: ***HR/Payroll Page > ND PERS Benefits Administrator Tile***

You should receive the PERS transfer kit from the transferring agency. Fill out the needed areas and send to PERS. Keep a copy to verify information once transfer is complete.

- Run your benefits enrollment report.
- Once a paycalc has run go to **Payroll Administrator Tile > Review Payroll Data > Review Paycheck** and double check that all looks correct.